

## Client Services 4.3 Release Notes

This version of Client Services includes changes to check issuance procedures.

- Checks are now issued to [Any Washington WIC Approved Store](#), instead of to a specific retailer.
- A new “[List of Approved Stores](#)” window has been added.
- The [Mailed Check Letter](#) has been rewritten and the window redesigned.
- The [Transfer Card](#) has been redesigned to fit the new check stock.
- Known issues with [Food Packages](#).
- [Client Services Help](#) is now available under the Help menu.

### ***Any Washington WIC Approved Store***

All computer checks now automatically print to “Any Washington WIC Approved Store.” You no longer need to select a retailer, and references to specific retailers have been removed from all of the Check windows except Check History.

### **New Check Design**

The checks have been redesigned and the information on them has changed. The caregiver name and the alternate endorser name are now both printed on the checks. Checks are signed at the store, and signature ID must be shown at the store when the check is signed.

### **Alternate Endorser**

To make it easier to verify the Alternate Endorser information, we have added view-only Alternate Endorser fields to the check tabs. The Alternate name now appears below the Client and Caregiver names at the top of the following tabs:

- Check Pickup: Print tab, Notes tab
- Void/Replace Checks: Checks List tab, Notes tab
- Replace Non-CIMS Checks: Replace Checks tab, Notes tab
- Record Handwritten Checks
- Unvoid Checks: Checks List tab
- Check History
- View Check Notes

Any changes must still be made on the Demographics tab. Remember that changes on the Demographics tab must be saved, and you need to refresh the Check Pickup screen by closing it and opening it again after you have saved your changes.

## Check Pickup Print Tab

- The Alternate Endorser has been added to the Client Information section in the top of the tab.
- The Retailer column has been removed from the Group Check Information section in the middle of the tab.
- The Retailer selection lists have been removed from the bottom of the tab.
- A Check Message selection list has been added below the Food Package selection list. Currently the only message available is “Babies were born to be breastfed”. This message appears at the top of the WIC checks.

|           |                  |           |           |   |                       |
|-----------|------------------|-----------|-----------|---|-----------------------|
| Client    | Smith, Rayanne T | Client ID | 11506913  | <input checked="" type="checkbox"/> See Notes | <a href="#">View</a>  |
| Caregiver | Smith, Martie T  | Age       | 1 Yr 2 Mo |   | <a href="#">Print</a> |
| Alternate | Smith, George T  |           |           |   |                       |

| Client Name      | Category | Food Pkg | Last Checks Issued |
|------------------|----------|----------|--------------------|
| Smith, Martie T  | PG       | W101LF-3 | June 2006          |
| Smith, Rayanne T | C        | C101LF-3 | June 2006          |

|  |   |  |
|--|---|--|
| <input checked="" type="radio"/> Print Group<br><input type="radio"/> Print Individual | <input type="radio"/> Monthly<br><input type="radio"/> Bi-Monthly<br><input checked="" type="radio"/> Tri-Monthly | Food Package: C101LF-Milk, 2% or less, 1# cheese<br># Cks: 3 |
| Check Message: Babies were born to be breastfed  |   |  |

New Check Pickup

## Void/Replace Checks

- The Alternate Endorser has been added to the Client Information section in the top of the Checks List and Notes tabs.
- All replacement checks are printed to “Any Washington WIC Approved Store”.
- The retailer name has been removed from the check details on the Checks List tab.
- The retailer selection list has been removed from the Replacement Criteria tab.
- Checks printed through this wizard have “Replacement Check” printed between the Actual Purchase Price and Month.
- Known Issue: The Check Message does not appear on replacement checks.

## Check History

- The Alternate Endorser has been added to the Client Information section in the top of tab.
- The Retailer column remains in the Check History window. The retailer name displays as “Any Washington WIC Approved Store” (which truncates as shown below) until after the check has been paid. The name of the Retailer that cashed the check will be added at the same time as the Paid Date.

|           |                 |           |          |
|-----------|-----------------|-----------|----------|
| Client    | Smith, Martie T | Client ID | 99996497 |
| Caregiver | Smith, Martie T | Age       | 33 Yr    |
| Alternate | Smith, George T |           |          |

  

| Issue Date | First Day to Use | Check #    | Retailer               | Food Package | Seq # | Paid Date  | Check Status | Source    | Replacement Re |
|------------|------------------|------------|------------------------|--------------|-------|------------|--------------|-----------|----------------|
| 04/14/2006 | 06/23/2006       | 1150662830 | Any Washington WIC App | W101 - 3     | 1     |            |              | On Demand |                |
|            | 06/23/2006       | 1150662831 | Any Washington WIC App | W101 - 3     | 2     |            |              | On Demand |                |
|            | 06/23/2006       | 1150662832 | Any Washington WIC App | W101 - 3     | 3     |            |              | On Demand |                |
|            | 05/23/2006       | 1150662801 | Mega Foods - Tumwater  | W101 - 3     | 1     | 06/06/2006 |              | On Demand |                |
|            | 05/23/2006       | 1150662802 | Mega Foods - Tumwater  | W101 - 3     | 2     | 06/06/2006 |              | On Demand |                |

**New Check History Window**

## Replace Non-CIMS Checks

- The Alternate Endorser has been added to the Client Information section in the top of the Replace Checks and Notes tabs.
- The retailer name has been removed from Replace Checks tab.
- Checks have “Replacement Check” printed between the Actual Purchase Price and Month.
- Known Issue: The Check Message does not appear on replacement checks.

## Unvoid Checks

- The Alternate Endorser has been added to the Client Information section in the top of the Checks List and Notes tabs.
- The retailer name has been removed from the check details on the Checks List tab.

## Record Handwritten Checks

- The Alternate Endorser has been added to the Client Information section in the top of the screen.
- The retailer name has been removed from the check details section of the screen.

## Print Batch Checks

A Check Message selection list has been added below the search selection criteria. Currently the only message available is “Babies were born to be breastfed”.

## Site/Preferences

The Retailer section of Preferences has been removed.

## List of Approved Stores

A new window has been added. From this window you can view and print lists of stores. Once you enter your search criteria, the list shows all stores in that group.

The List of Approved Stores window can be accessed in three places:

- The new shopping cart icon on the tool bar.



- The Checks menu (it's the last item).
- The Clinic menu in **Clinic Reports**. This replaces the Retailer Listing report.

| Search By                                 |                            |                              |                                |                           |                |  |
|---|----------------------------|------------------------------|--------------------------------|---------------------------|----------------|--|
| <input checked="" type="radio"/> Zip Code | <input type="radio"/> City | <input type="radio"/> County | <input type="radio"/> Retailer | <input type="radio"/> All | 98532          |  |
| Name                                      | Address                    | City                         | ST                             | Zip                       | Phone Number   |  |
| Chehalis Shop-n-Kart                      | 2100 National Ave.         | Chehalis                     | WA                             | 98532-0000                | (360) 748-1936 |  |
| Fullers Market Place #1                   | 771 S. Market Blvd.        | Chehalis                     | WA                             | 98532-0000                | (360) 748-8869 |  |
| La Mission Bakery Spanish Market          | 2100 N.National Ave        | Chehalis                     | WA                             | 98532-0000                | (360) 330-8456 |  |
| Safeway #3525                             | 1100 S Market Blvd.        | Chehalis                     | WA                             | 98532-0000                | (360) 748-3777 |  |
| Wal-Mart Supercenter #2249                | 1601 N.W. Louisiana Ave.   | Chehalis                     | WA                             | 98532-0000                | (360) 748-1240 |  |

### List of Approved Stores

This new type of window gives you lots of options and flexibility. Here's how you use it:

1. Open the window by clicking the icon or selecting List of Approved Stores from the Checks menu.
2. Select a "Search By" button.
3. Start typing the selection for the "Search By". You don't need to click or tab to the selection field. For example, if you want to view all the stores in zip code 98532, select the Zip Code button and evenly type 9 8 5 3 2 (if you hesitate between keystrokes it thinks you've finished).
  - **Sort** by clicking on the column headers. One click on Name sorts retailers alphabetically by name. Another click reverses the sort. (Within a zip code or county you may want to sort by City.)
  - **Print** by clicking the print icon on the tool bar.
  - **Close** the list by clicking the "Close Window" icon.

### Known Issues:

- When you select "Retailer" the selection list remains empty and all retailers are displayed. You can type in a store name and limit the list to what you type, but you cannot tab or click to the selection field and get a list of stores to select from.
- Two store names, "Any Authorized WIC Retailer" and "Any Washington WIC Approved Store," that are used only by the state office appear in some of the retailer lists. These are not real stores and should just be ignored.

## ***Mailed Checks letter***

The Mailed Checks Letter window has been changed. The letter now appears below the client name and address, and you can scroll to see the entire letter.

|  |                                       |
|--|---------------------------------------|
| <b>Caregiver Name</b>  | Smith, Martie T.                      |
| <b>Address</b>   | 666 Magnolia Way<br>Emerald, WA 98000 |
| Smith, Martie T.<br>666 Magnolia Way<br>Emerald, WA 98000<br><br>Dear Martie T. Smith:<br><br>We do not want you to miss out on WIC foods. Due to special circumstances, we are mailing your WIC checks. WIC checks may be enclosed for: |                                       |

### **New Mailed Checks Letter Window**

The text for both English and Spanish versions has changed to more clearly instruct the client on how to use the checks, not to sign the check(s) prior to going to the store, and that the client will need to show signature ID at the store.

We have also fixed several problems that were reported to the Help Desk.

## ***Transfer Card***

The Transfer Card information has been rearranged to fit the new check stock. All the same information is there, just in different places.

|   |   |   |   |
|---|---|---|---|
| <b>Client Name:</b> Smith, Martie T                 |   | <b>Client ID #:</b> 99996497  |   |
| <b>Priority:</b> 1                                  |   | <b>Income Determin. Date:</b> Mar 23, 2006                                    |   |
| <b>Date of Birth</b><br>Dec 16, 1972                | <b>Eligibility Begins</b><br>Mar 23, 2006 | <b>Eligibility Ends</b><br>Nov 30, 2006                                       |   |
| <b>Nutrition Risks</b><br>Two Pregnancies/Two Years |   | <b>Last Check Issued</b><br>Jun 23, 2006                                      | <b>EvergreenCHD-Emerald</b><br>1122 Mystic Lane<br>Emerald, WA 98999<br>(360)111-2222 |
|   |   | <input type="checkbox"/> Jane Jones<br><input type="checkbox"/> WIC Certifier |   |

### **New Transfer Card Format**

Up to 6 nutrition risk factors print on the card. Risks are printed in priority order. If there are more than 6 risk factors, medical risks will print before dietary risks.

Infant transfer cards print the type of formula on the last check issued. To make room for the formula name, only 5 risk factors can be printed, although up to 6 will display on your screen.

## ***Food Packages***

There are some known issues with the food packages that appear in the selection lists when issuing checks.

- Do not use the infant food packages that appear in the selection lists for category Child. If the child needs formula only the Special series (S, SX) should be used.
- Do not use the I800 series of food packages that appear in some of the infant selection lists.

## ***Help***

Client Services Help has been added to the CIMS Help menus and is available with this release. Here's a brief description of the items you see in the Client Services Help menu.

- **Client Services Help.** This is an electronic User Guide. It is still being developed; you will receive additional sections as they become available. If a topic you need isn't there, please call the Help Desk with your question. We will try to get your question and the answer into Help as soon as possible.
- **What's New** contains the current release notes.
- **How to Use Help Tutorial** is an interactive demonstration on how to effectively use Help to find answers to your questions.
- **Check in/out Help** provides instructions and assistance for those sites that use Satellite to provide services to remote sites.
- **About Client Services** shows you the version you are currently using. It also shows you your database name just above the [OK] button.